

What to Expect When Presenting an Article or Budget for FinCom Vote

Under Town Bylaws, West Newbury's Finance Committee is charged with vetting, analyzing and voting whether to recommend "all Articles in the Warrant, especially those involving the appropriation of money." We also must present an Omnibus Budget at the Annual Town Meeting. We must prepare a booklet to guide Town Meeting and must explain our rationales to the Town. The Finance Committee takes these responsibilities seriously and works hard to obtain a full understanding of the pros and cons of all matters that come before it.

The Finance Committee cannot in good faith recommend a proposal that it does not fully understand. To help you help us do our job when you have a matter that will require a FinCom vote, we have prepared this guide, which will be circulated to every Town Department, Board, and Committee approximately four months prior to each Town Meeting.

If you would like FinCom to vote on your proposed Article or Budget item, please a) provide us with requested information via <http://www.wnewbury.org/home/webforms/contact-us> **SUBJECT Finance Committee** and b) arrange to meet with us as requested, and c) specifically please:

- 1) Provide any Article submission on the Town Article Request Form (sample attached as Appendix 1) and any supporting materials to the Selectmen so that the submission may reach us in a timely manner—and provide summary answers as opposed to "see attached";
- 2) Provide any proposed budget and any supporting materials (with prior comparative data, sample attached as Appendix 2) to the Finance Director for timely submission to us;
- 3) When we ask to meet with you, make yourself available in time for FinCom to complete its evaluation;
- 4) Provide FinCom members with any additional written materials at least one week prior to meeting with us;
- 5) Be prepared to answer questions relating to such matters as a) the short- and long-term costs and benefits of your proposal; b) your consultation with/approvals from other affected Town departments, committees, boards; c) the alternatives you considered in developing your proposal; d) your proposed funding source(s); e) your plan to implement the proposal if approved at Town Meeting; f) date for completion/sunsetting of Article;
- 6) Keep us up to date with follow-up information FinCom may request as well as any changes to or further developments regarding your proposal;
- 7) Recognize that the FinCom booklet--the culmination of months of Committee work--will go to press at least two weeks before Town Meeting, making last minute changes infeasible.
- 8) With regard to prior approved money Articles, provide us with status updates explaining the expenditures to date and work accomplished (please note the Prior Money Articles Status spreadsheet provided to Departments and Committees should be filled out with respect to completion dates).

ARTICLE REQUEST FORM

ARTICLE:

AMOUNT REQUESTED:

CONTACT PERSON:

PHONE NUMBER:

Why should the town make this purchase? What needs will be met? Who will benefit?

What factors affect the timing of this purchase?

When should this Article be sunsetted--how long will the project take?

What ancillary costs do you anticipate? (Maintenance, Insurance, Training, etc.)

Does this Article involve improvement, preservation or creation of tangible assets and projects which 1) have useful life of at least five years; 2) cost over \$20,000 and or 3) for which the town is authorized to borrow funds? If so, please confirm that this item is on the Capital Improvements Committee Schedule for future capital investments.

Please attach additional pages or other supporting documentation.

	FY2016	FY2017				FY2018				FY2019
	Actual Expended	Budget Requested	Budget Approved	Actual Expended	Turn back / Transfers	Budget Requested	Budget Approved	Actual Expended	Turn back / Transfers	Budget Requested
1 SAMPLE DEPARTMENT										
Salary & Wages	237,551	245,000	245,000	236,520	8,480	245,000	245,000	236,520	8,480	
Overtime	28,542	35,000	30,000	26,250	3,750	35,000	29,000	26,250	2,750	
Training	2,835	5,000	5,000	3,251	1,749	5,000	4,000	3,251	749	
Technical Services	3,750	4,000	4,000	2,650	1,350	3,000	3,000	3,100	(100)	
Vehicle Allowance	265	500	500	220	280	500	500	220	280	
Photocopier	379	500	500	385	115	500	500	385	115	
Other Expenses	1,350	1,500	1,500	879	621	1,500	1,500	879	621	
1 SUBTOTAL	273,322	290,000	285,000	269,276	15,724	289,000	282,000	269,726	12,274	-

Please complete the above current fiscal year budget request.

For each line item that varies from prior year actual, provide a detailed explanation below.

For any salary/wage increases/decreases, provide all relevant information. (prior hours/rate, new hours/rate, approvals received, and reason for request)

Budget request submitted by: _____

Contact (phone/email): _____